Effectively Managing Risk with OrgSync

The University of California, Santa Barbara, needed an effective way to evaluate and manage the risks of student-run events in order to better protect students and the campus. Their original paper-submission process required a lot of time and attention from staff and didn’t provide enough documentation of their recommendations and decisions. By switching to a digital submission process through OrgSync, UCSB sped up the process and helped them to more efficiently manage liabilities.

The Problem

STAYING AHEAD OF RISKS

Evolving ordinances, policies, and laws required UCSB to track all events and the potential risks at each, but the original paper system required a student leader to submit a paper form and meet with the Student Life advisor. This often happened at the last minute, and the form wasn’t always accurately updated. In addition, an accident at a sister campus revealed that although the campus was well-covered by insurance, student-leaders were vulnerable.

OVERLOADED SCHEDULES

All minor event requests had to be approved by just one person, Katya Armistead, Associate Dean of Students and Director of Student Life at UCSB. There could be as many as 15 events on campus in any given week among the 400 organizations, and students had to hope they could schedule a meeting in time to get approval for their events. With Katya’s many other responsibilities, that was often a challenge.

MANAGING INSURANCE

In order to provide event protection, UCSB had to meet insurance standards, which required event rosters, waivers, and approval with the university. With a paper system and only one administrator, the university was struggling to meet these standards, and managing an accurate roster was untenable.

“Before, I was the only one who would have seen their budget and planning guide. Now major players have seen and are familiar with the event that is about to be presented.”

- Katya Armistead
  Associate Dean of Students and Director of Student Life
The OrgSync Solution

MORE EFFICIENT PROCESSES

UCSB created the “360 Event Planning” guide as a form on OrgSync, which student leaders were required to submit before every event. The planning guide organized the required information, logged student involvement, and streamlined the approval process. The form was quickly adopted by students and made it easier for the university to maintain insurance coverage of their students.

“The time invested in creating a really thorough form worked well. [Students] really seemed to appreciate the independence, and I think it’s improved our risk management effectively,” said Miles Ashlock, Associate Director of Student Life at UCSB.

IMPROVED ACCESSIBILITY

OrgSync’s digital forms can be submitted at any time of day, from anywhere the student may be. UCSB’s “360 Event Planning” guide is automatically sent to Katya for approval, and simultaneously sends built-in alerts to the appropriate stakeholders to inform them of upcoming events and updates. The student leader also receives an email informing them that they will be required to attend an in-person meeting with Katya for approval. Automating these submissions has improved student attendance at these meetings, clarified what kinds of information are required, and alerted the administration to potential problems well before an event occurs.

ALERTING STAKEHOLDERS

The “360 Event Planning” guide sends a notice of the pending event to stakeholders such as the fire marshal, campus police, an audio/visual team representative, and the campus caterers. With OrgSync, all necessary parties automatically receive notice as soon as the student leader submits it and can be prepared with additional questions or concerns as needed. The “360 Event Planning” guide has broadened event awareness while improving response times.

“Before, I was the only one who would have seen their budget and planning guide. Now major players have seen and are familiar with the event that is about to be presented,” said Katya.

TRACKING AND ARCHIVING DATA

Because students now can RSVP to an event online, event rosters are dramatically easier to create and maintain, better satisfying insurance requirements. OrgSync also allows Katya to make notes on the successes or problems of past events, resulting in improved future planning and organization. The planning guide also maintains a record of all events and waivers received, making them easily accessible in the event of an emergency.

“The time invested in creating a really thorough form worked well. [Students] really seemed to appreciate the independence, and I think it’s improved our risk management effectively.”

- Miles Ashlock
  Associate Director of Student Life

Miles Ashlock
Associate Director of
Student Life

805.893.3544
miles.ashlock@sa.ucsb.edu

Katya Armistead
Associate Dean of Students
and Director of Student Life

805.893.8912
katya.armistead@sa.ucsb.edu